Online Form Templates

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With online form templates you can customize the look and layout of your NetSuite online forms. Online form templates are useful if you do not use a NetSuite website but use NetSuite's online customer and case forms.

Online form templates are HTML documents that you create outside of NetSuite. You then either upload them to your NetSuite file cabinet or paste on the template record. Experience with HTML can be helpful when creating an online form template.

> **Note:** To use custom HTML templates, an administrator must enable the Marketing Automation feature.

To create an online form with an HTML online template do the following:

1. Create the HTML file that will be used.
2. Upload your template to the file cabinet. Click new on the template record, or place it in the Marketing Templates folder in your file cabinet. For more information, see Uploading an Online Form Template.
3. Create a template record at Documents > Templates > Marketing Templates > New (Administrator) > Online Form. For more information, see Creating an Online Form Template Record.
4. Create your online customer form at Setup > Marketing > Setup Tasks > Online Customer Forms > New (Administrator) or your online case form at Setup > Support > Case Management > Online Case Forms > New (Administrator). For more information, see Online Customer Forms.

When you create an online form template, you decide which fields to include, and you arrange them on the form. You also decide the style of the page.

Three things must be included in the HTML code:

- <NLFORM> and </form> tags in the code of the page
- <html> and </html> tags
- tags for each field included on the form
- a button respondents use to submit the form

To place fields on an online customer form, use tags from the table below:

Field	**Tag**
Company Name	<NLCOMPANYNAME>
Address Line 1	<NLADDRESS1>
Address Line 2	<NLADDRESS2>
City	<NLCITY>
Comments	<NLCOMMENTS>
Confirm Password	<NLPASSWORD2>
Contact First Name	<NLFIRSTNAME>
Contact Last Name	<NLLASTNAME>
Contact Middle Initial	<NLMIDDLENAME>
Country	<NLCOUNTRY>
Currency	<NLCURRENCY>
Customer Category	<NLCATEGORY>
E-mail	<NLEMAIL>
E-mail Preference	<NLEMAILPREFERENCE>
Give Access	<NLGIVEACCESS>
Lead Source	<NLLEADSOURCE>
Login Password	<NLPASSWORD>
Partner	<NLPARTNER>
Partner Code	<NLPARTNERCODE>
Phone Number	<NLPHONE>
Promotion	<NLPROMOCODE>
Shipping Item	<NLSHIPPINGITEM>
State / County	<NLSTATE>

Ask a Question

Submit a Case

For lower severity cases, please submit a case via Contact Support Online to initiate research and testing on your issue.

Contact Support Online

NetSuite User Group

Case Severity Level Definitions

Case Status Definitions

Urgent Questions

Call Us

For higher severity cases that significantly affect your use of NetSuite, please contact NetSuite Support by phone

Contact Support by Phone

NetSuite Support Phone Menu Routing Options

NetSuite Issue Resolution Process

Severities and Status Definitions for Non-ERC Defects

Log in to Release Preview

Release Preview phone #

North American Toll Free:

1-877-774-4271

International:

1-925-948-1084

Additional Resources

- Help Topic Weekly Updates
- Tips
- Videos
- Training Course Catalog
- Training Webinars & Events
- Contact NetSuite Training

Taxable	<NLTAXABLE>
Unsubscribe from Campaigns	<NLUNSUBSCRIBE>
Web Address	<NLURL>
Zip/Postal Code	<NLZIPCODE>

To place fields on an online case form, use tags from the table below:

Field	**Tag**
Company Name	<NLCOMPANYNAME>
Name	<NLENTITYID>
E-mail	<NLEMAIL>
Message	<NLINCOMINGMESSAGE>
Subject/Title	<NLTITLE>
Case Origin	<NLORIGIN>
Case Type	<NLCATEGORY>
Contact First Name	<NLFIRSTNAME>
Contact Last Name	<NLLASTNAME>
Contact Middle Initial	<NLMIDDLENAME>
Phone Number	<NLPHONE>
Start Date	<NLSTARTDATE>
Start Time	<NLSTARTTIME>
Support Issue	<NLISSUE>
Support Item	<NLITEM>

When you create your online form, you can choose to have NetSuite insert field names into your form. Alternatively, you can label the fields on the form with text in your template.

Your form should also include a button your customers use to submit the form to your NetSuite account. The HTML code for this button is:

```
<input type="submit" value="Button Text">
```

Copy

You can substitute text in the button by changing the value in the code. For example, if you want the text in the button to read Submit Form, the code would be:

```
<input type="submit" value="Submit Form">
```

Copy

Below is a sample online form template:

```
<HTML>
  <Head>
    <Title>OnlineLeadForm</Title>
    <link href="/images/stylesheet.css " rel="stylesheet" type="text/css">
    <style type="text/css">
   </style>
  </Head>
<Body>
  <NLFORM>
    <table width="60%" border="0" align="center">
      <tr>
        <td bgcolor="#FFFFFF" valign="bottom" align="center" height="55">
          <p align="left">  <NSLOGO>
        </td>
      </tr>
      <tr>
        <td bgcolor="#FFFFFF" valign="middle" align="center" height="1">
        <hr color="#CCCCCC" align="left" size="1"></td>
      </tr>
      <tr>
        <td class="textll"><h1>
        <center>
        <span class="mainheader1 style1">Register With Us!</span>
        </center>
        </h1>
        <p align=Left> This is a sample online form template.
        <p> New leads would complete the fields below:
        <p><b>Name</b> <NLFIRSTNAME> <NLLASTNAME><br>
```

```
        Here you might enter special instructions.
        <p><b>Company Name</b> <NLCOMPANYNAME>
        <p><b>Email Address</b> <NLEMAIL>
        <p><b>Street Address</b> <NLADDRESS1>
        <p><b>City</b> <NLCITY>
        <p><b>State</b> <NLSTATE>
        <p><b>Zip/Postal Code</b> <NLZIPCODE>
        <p><input type="submit" value="Button Text"></p>
        <p align="center"><a href="http://www.linkbacktoHomePage.com">Company Home</a>
        <a href="http://www.link1.com">Support</a> | <a href="http://www.link2.com">Help</a>
        </td>
      </tr>
    </table>
  </form>
</Body>
</HTML>
```

Copy

This example uses a stylesheet. You can reference a cascading stylesheet in your online forms if you store the CSS file in the Images folder of your File Cabinet. You should use a relational URL to reference the stylesheet. In the example above, the reference is:

```
<link href="/images/stylesheet.css " rel="stylesheet" type="text/css">
```

> **Important:** You must include all appropriate end tags as well as <html> and <body> tags for NetSuite to recognize this file as an HTML file.

After you prepare your template file, upload it to your NetSuite file cabinet.

Related Topics

Uploading an Online Form Template

NetSuite saves online form templates in the Marketing Templates folder of your file cabinet, by default. To change the folder you use to store your templates, an administrator or Sales Administrator can go to Setup > Sales > Preferences > Sales Preferences (Administrator).

To upload an online form template:

1. Click the **Documents** tab.
2. In the Documents Links portlet, click **File Cabinet**.
3. On the Folder Contents page, click **Marketing Templates**.
4. Click **Add File**.
5. In the File Upload window, locate your online form template on your hard drive.
6. Select the file.
7. Click **Open**.
8. On the Folder Contents page, click **Add**.

Now you can create an online form template record to apply to your forms.

Related Topics

Creating an Online Form Template Record

After you upload your template to your file cabinet, create an online form template record.

To create an online form template record:

1. Go to Documents > Templates > Marketing Templates > New (Administrator).
2. On the Select Type page, click **Online Form.**
3. On the Online Form Template page, enter a name for the template.
4. In the **Title** field, enter the text you want to appear at the top of the browser window when someone navigates to your form.
5. Enter any additional information in the **Description** field.
6. If you created this file outside of NetSuite,
   a. Select **File**.
   b. Select the template in the **Template File** field.
   c. Click **Preview** to see your template in a new window.
7. If you are creating the template on the record,

a. Select Text Editor.
b. Enter the text in the **Template** field.

8. To insert a field in the template text, choose the type of record you want to insert the field from, and select the field in the **Insert Field** list.

   NetSuite places the field tag at your cursor in the text.
9. If you want to be the only one to use this template, check the **Private** box.
10. If you want this template to only be used by members of a group, select that group in the **Restrict to Group** field.
11. Click **Save.**

Now, you can select this template when you create an online form.

For information on creating a customized online form with online form templates, read Online Customer Forms and Online Case Forms.

Related Topics